

Project Managers' Advisory Group

MINUTES July 21, 2008

Attending:

(* = by phone)

Bob Giannuzzi	EPMO
Charles Richards	EPMO
Kathy Bromead	EPMO
Alisa Cutler	EPMO
Barbara Swartz	EPMO
Jesus Lopez	EPMO
Gaye Mays*	EPMO
Kelly West	ITS
James Myers	ITS
Rob Pietras	ITS
Dave Butts*	WRC
Lynne Beck	DHHS DMH/DD/SAS
Joe Cimbala	DHHS DMH/DD/SAS
Gary Lapio	DHHS
Cheryl Ritter	DOT
Lloyd Slominsky	DOC
Emily McGill	DOL
Jim Skinner*	DOI
Vicky Kumar*	OSC
Susan Huang*	DOR
Lucy Cornelius	DPI

Bob Giannuzzi welcomed everyone to the meeting. **Lloyd Slominsky** was acknowledged as a first time attendee.

Kathy Bromead acknowledged **Lori Williams**, **Marci Keiser**, and **Lisa Haire** of DHHS for passing the PMP exam. They all attended the last PPMP Exam Prep class sponsored by the EPMO. They will all receive a letter from the SCIO recognizing them for their achievement.

Bob solicited and received approval of the June minutes.

Jesus Lopez reported that Cycle 7 of the EPMO's PMP Exam Prep class has concluded. Of the 15 attendees, three have signed up to take the exam in June. He also pointed out that the waitlist for the fall sessions is already at 16 candidates. **Jesus** thanked all the instructors, especially **Sarah Joyner** (4th time!), and also **Linda Lowe** for her invaluable assistance.

Bob reminded everyone that preregistration for the NCPMI Annual Event on September 3 will be strictly online via credit card. PMI member discounts are available. He also reported on other imminent NCPMI meetings of interest (from the NCPMI website):

- The August 7 Public Sector LIG will have Manoj Pandya speaking on *ASAP – Accelerated SAP Implementation Methodology*
- On August 27, the PMO Committee (LIG) will have Steve Davis speaking on *Business Continuity Planning and PMO Involvement*.

Kathy Bromead advised that the Digital Government Technology Summit coincides with the annual event.

Alisa Cutler summarized Methodology Group activities:

- The revised Closeout document draft is out for review. **Alisa** solicited feedback by 7/30. The plan is to have a Closeout tab in the next release of the PPM tool
- The group is working on a checklist for monthly status reporting. The group was asked to provide input. **Kathy Bromead** mentioned that **Barbara Swartz** track tool related issues from monthly assessments. These will be taken into consideration in developing this checklist.
- The Procurement Plan document is also under revision.
- **Alisa** welcomed **Jose Berdiel** as the newest member of this team.

Bob passed out the following information on upcoming teleconferences of interest to the PM Advisory Group. He again pointed out the opportunity for a PMAG member to present at a NASCIO teleconference. **Bob** and **Kathy** followed up on our current entitlement with Corporate Executive Board. We do have limited access to the Application and Infrastructure councils (discontinued subscriptions). For any requests for research or teleconference participation, contact **Bob**. He was to send out the CEB membership guide with the minutes. **Kathy** looked at one of the self-paced training modules on PMOEC and thought it was well done. **Bob** also pointed out a diagnostic PMO assessment tool is available.

Organization/website	Contacts	Upcoming Calls
NASCIO http://www.nascio.org/committees/projectmanagement/	Stephanie Jamison 859/514-9148 sjamison@AMRms.com <u>Access</u> 888/272-7337 conference ID 6916986	No August presentation
PMO Executive Council http://www.pmo.executiveboard.com/	Register at website	<u>July 22</u> (12:00 PM) Lightweight Portfolio Stewardship: Striking the Right Balance Between Process Rigor and Executive Judgment <u>August 13</u> (11:00 AM) Profile of the High-Performing Project Manager: Drivers of Project Manager Effectiveness
CIO Executive Council http://www.cio.executiveboard.com/	Register at website	<u>August 12</u> (12:00 PM) World-Class IT Strategic Planning
Application Executive Council http://www.aec.executiveboard.com/	Contact Bob Giannuzzi to register	<u>July 24</u> (11:00 AM) Mastering Applications Multisourcing <u>August 14</u> (6:00 PM) Improving the Effectiveness of Applications Deployment
Infrastructure Executive	Contact Bob	<u>July 23</u> (10:00)

Council http://www.iec.executiveboard.com/	Giannuzzi to register	Prioritizing Investments Across Infrastructure Services
Information Risk Executive Council http://www.irec.executiveboard.com/	Register at website	<u>July 22 (11:00)</u> Effective Techniques to Assess Critical IP Risks <u>August 12 (11:00)</u> Network Access Controls
Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/	Register at website	<u>July 24 (12:00)</u> Architecture Foundations for Business Intelligence

Jesus Lopez briefed the group on the EPMO's effort to revise its website. He has updated content on QA roles/responsibilities, Tactical Plan, PMP classes, and PPM. **Barbara Swartz** has included quarterly PPM changes, the latest EPMO Newsletter, and the training schedule.

Barbara Swartz has received feedback on interest in the four proposed courses (Requirements, RFP, BA Boot Camp, Estimating) from 10 agencies. There were a total of 134 requests for seats. She's still awaiting DHHS's requirements.

Charles Richards advised that the PPM tool team has had no feedback on the June 27th release. He also reported that the PPM upgrade to Microsoft PPS 2006 has been installed in a test environment and testing has started. The goal is to go live in September.

Lessons Learned from recently closed projects were distributed in advance but not discussed at the meeting.

Bob advised that the presentation on the role of the ITS Architecture and Engineering function slated for this meeting has been postponed to the next one in August.

Meeting adjourned at 3:35.

NEXT MEETING
Monday, August 18, 2008
ITS Conference Room 2 or (919)981-5520

Lessons Learned Documentation

Exhibit A

Department of Insurance - Seniors' Health Insurance Information Program (SHIIP) Advanced Counselor Program

Topic	Lessons Learned
1. RFQ Development and Approval Process	Although the project was being funded entirely with a federal grant award, it was still necessary to follow through for State approval which took nearly 5 months for development and approval process.
2. Software implementation	Training session provided by vendor and all other training occurred through trial and error.
3. Recording Function	We learned the State facilities were not conducive for audio layover recording which necessitated the need to find off-site facilities to conduct such.
4. Editing Function	Considerable time was spent editing the visual and audio portions of the project. There was a learning curve with the editing procedures that consumed time not anticipated.
5. Updating Procedures	Because of ongoing changes to the Medicare program, on two occasions we have updated the audio and visual portions of the project successfully with minimal assistance from vendor.
Topic	Lessons Learned
6. RFQ Development and Approval Process	Although the project was being funded entirely with a federal grant award, it was still necessary to follow through for State approval which took nearly 5 months for development and approval process.
7. Software implementation	Training session provided by vendor and all other training occurred through trial and error.

Exhibit B

DHHS - DMH DWI Certification

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?

If I/T can understand the users business processes – what they are doing and why they do it that way – I/T can provide suggested process automation for the user's approval. I/T must understand who their user is serving and what they are actually doing to accomplish their objectives. Everybody who is affected by the system must get some benefit (or at least no detriment) from it. This will result in all users realizing savings and therefore satisfaction.

2. **LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?

Don't assume that your business owner is keeping the sponsor informed. Keep meeting with and copying the sponsor on everything, even if it seems a waste of their time. The sponsor will let you know if they do not want that level of information.

Exhibit C

ITS - SDC – Telecomm Infrastructure

Planning & Design Phase:

Topic	Lessons Learned
1. Monthly Status Reporting	Status reporting was completed using a Microsoft Project plan and weekly discussions with Senior Management.
2. ETS System Design Document	The technical staff did a good job of keeping the design document up to date.

Execution & Build Phase:

Topic	Lessons Learned
1. Risk Management	A Risk Management Plan would have been beneficial to alleviate a three month delay due to parts not being available from the vendor. This would have been flagged early in the process and an alternative plan (such as earlier procurement of needed parts) developed.
2. Vendor Management / Vendor Performance / Vendor Deliverables	Needed tighter control over vendor deliverables such as power supply equipment.
3. Hosting Provider (setting up environments)	Setting up new environments from scratch always takes more effort than anticipated. Needed better planning for anticipated vendor problems.

General Comments:

Topic	Lessons Learned
1. Project Manager	Using a Project Manager experienced with the EPMD processes will minimize the documentation and reporting efforts while assuring efficient movement through the processes.
2. Program Management	This project was part of a group of projects (more than 6) that would have been better handled as a program since most of the project management work on all of the projects was redundant.

Exhibit D

ITS - SDC – Mainframe Capacity Backup

Initiation Phase:

Topic	Lessons Learned
1. Business Case / Project Charter	No official project charter was created for this project. It should have been completed as part of a Second Data Center Program.
2. Benefits	Benefits were not developed for this project. They were defined as part of the overall SDC Program.
3. Managing Sponsor Expectations	The Sponsor's expectations were to get the job done.

Planning & Design Phase:

Topic	Lessons Learned
1. Monthly Status Reporting	Status reporting was completed using a Microsoft Project plan and weekly discussions with Senior Management.
2. ETS System Design Document	The technical staff did a good job of keeping the design document up to date.

Execution & Build Phase:

Topic	Lessons Learned
1. Risk Management	A Risk Management Plan would have been beneficial to alleviate a three month delay due to parts not being available from the vendor. This would have been flagged early in the process and an alternative plan (such as earlier procurement of needed parts) developed.
2. Project Schedule / Milestones / Project Planning	A Microsoft Project Plan was effectively used to manage the schedule and milestones. This was also the primary reporting tool used with Senior Management.
3. Testing (test execution, verification & validation, test scripts, test cases)	No test plan was developed for this project. Testing relied on individual component testing with acceptance testing accomplished through a disaster recovery exercise controlled by another project.
4. Hosting Provider (setting up environments)	Setting up new environments from scratch always takes more effort than anticipated. Needed better planning for anticipated vendor problems.

General Comments:

Topic	Lessons Learned
1. Project Manager	Using a Project Manager experienced with the EPMO processes will minimize the documentation and reporting efforts while assuring efficient movement through the processes.
2. Program Management	This project was part of a group of projects (more than 6) that would have been better handled as a program since most of the project management work on all of the projects was redundant.

Exhibit E

ITS - ITAM Project Phase I

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?

The positive lesson is the importance of communications and team collaboration. This effort was extremely fast paced with a hard target date. To meet targets and expectations, it was necessary for all team members (including the vendor) to be in synch with one another.

2. **LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?

The opportunity for improvement lies with the concept of working within the complexities of a new system. We had increased risk factors with a new system in the complexity of our system network/architecture, and, data gathering.

Initiation Phase:

Topic	Lessons Learned
4. Project Approval Process	The format of the approval made it difficult for us. We were doing a purchase for what would eventually be a statewide effort, but the initial project was a small one. It was hard to explain that we did not know how much statewide implementation would cost, when we did not even know what the initial project would cost.
5. Managing Customer Expectations	Trying to keep the initial project small was quite difficult.

Planning & Design Phase:

Topic	Lessons Learned
1. Managing Sponsor Expectations	Sponsor had expectation of a very fast rollout. This made the project accelerated for the participants.

Execution & Build Phase:

Topic	Lessons Learned
4. Vendor Management / Vendor Performance / Vendor Deliverables	Vendor underestimated the complexity of the state telecommunications network. This increased risk.

Implementation Phase:

Topic	Lessons Learned
1. Risk Management	We were driven by a hard date, which added risk. This was managed by high level of monitoring.